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Analysis of the main development actors involved in tourism.
The case of Uzbekistan and implications for the World Tourism Organization
(UNWTO)

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Abstract: *Tourism as an area within development has received an increasing interest in the international aid community in recent years. Yet, until now, very few research has been done on the dynamics shaping this area and its main actors. This paper focuses on analyzing the main institutional development actors involved in tourism in Uzbekistan, spanning from international organizations, multilateral banks and bilateral development agencies. The objective is to define the role that the World Tourism Organization (UNWTO), the specialized United Nations agency in tourism, can play in a context marked by a multiplicity of actors with a strong local presence and larger resources. The methodology used includes interviews to representatives from the Government and the principal aid actors working in tourism in Uzbekistan, along with academic reviews. The analysis shows that UNWTO can play an important role given the increasing relevance of tourism within development in the region. To fully harness these opportunities, UNWTO will need to give visibility to its principal competitive advantage – its specific tourism expertise – and strengthen its ties with established aid actors on the ground, which will enable the organization to be considered as a partner in future development projects.*

Keywords: *Tourism, development, Uzbekistan, development actors, World Tourism organization (UNWTO), United Nations, Official development aid (ODA)*

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Abbreviations

Aft	Aid for Trade
ADB	Asian development bank
DAC	Development Assistance Committee
EIB	European investment Bank
EU	European Union
EBRD	European Bank for Reconstruction and Development
FDI	Foreign Direct Investment
GDP	Gross development product
IUOTPO	International Union of Official Tourist Publicity Organizations
JICA	Japan International Cooperation Agency
KOICA	Korean International Cooperation Agency
NGOs	Non-governmental entities
OECD	Organization for Economic Cooperation and Development
ODA	Official development assistance
UNDAF	United Nations Development Assistance Framework
UNEP	United Nations Environment Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNDP	United Nations Development Programme
UNWTO	World Tourism Organization
WB	The World Bank
WTO	World Tourism Organization (Previous name)
WTO	World Trade Organization

Introduction

In recent years, tourism has gained importance within the international development community which perceives the sector as a potential area of work within development cooperation activities for both governments, development agencies, Non-governmental entities (NGOs), and other relevant aid actors. If well-developed and managed, tourism has indeed the potential to contribute to the creation of socio-economic opportunities for local communities, which is particularly relevant in emerging tourism destinations where the tourism sector is still merely developed. Against this backdrop, many argue that the sector is now also facing challenges and trends traditionally associated with the international aid community such as the multiplicity of actors, lack of coordination or the emergence of new actors which pose a challenge in ensuring the efficiency of the allocation of funds. Such situation hinders the work of aid actors, in particular of relatively less-known ones, which compete with more established actors in the allocation of development projects.

This thesis examines the role that the United Nations World Tourism Organization (UNWTO) can play as a development agency in tourism. To proceed, this paper will draw the profiles of the main institutional development actors involved in tourism, identify their principal competitive advantage and pursuant to it, draw recommendations for the work of UNWTO. For simplicity matters, the scope of the thesis has been limited to the country of Uzbekistan – a country whose relatively low developed tourism sector has raised a growing interest among the international aid community in the last years, including from UNWTO which is considering implementing development projects in this country in the near future.

This thesis will be comprised of five sections: the theoretical framework which will set the bases for highlighting the research that has been done so far on the link between tourism and development and the involvement of the international aid community. The paper will then highlight the methodology that will be used to answer to the question raised before conducting the analysis and drawing the subsequent main recommendations and conclusions.

I. Setting the base: Tourism as a tool for development

Tourism: dynamism and growth

Over the last decades, tourism has experienced continued growth and deepening diversification, becoming one of the fastest growing economic sectors in the world. Last year, a total of 1.4 billion international tourists decided to cross the borders – an impressive increase from the mere 25 millions of tourists registered in 1950 according to the World Tourism Organization (UNWTO), and a number that is expected to grow by 3 to 4% in the years to come ((UNWTO), 2019). Defined as “*a social, cultural and economic phenomenon which entails the movement of people outside their usual environment for not more than one consecutive year for leisure, business and other purposes*” ((UNWTO), Understanding Tourism: Basic Glossary, 2007), tourism has gained significant relevance over the years as a major economic sector but also, and increasingly, as a powerful contributor to sustainable development.

Tourism and sustainable development

The most commonly used definition of sustainable development is still that given in the report of the World Commission on Environment and Development (1987), i.e. sustainable development is ‘a process to meet the needs of the present without compromising the ability of future generations to meet their own needs.’ Sustainable development is therefore about creating a better life for all people in ways that will be as viable in the future as they are at present ((UNEP), 2005).

Stemming from this, the most commonly used definition of sustainable tourism refers to a type of tourism “*takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities*” ((WB), Tourism for development, 2017). The positive contribution of sustainable tourism to development is commonly divided in the following five key areas:

Economic growth: Tourism accounts for 10% of the world’s global gross domestic product, both direct, indirect and induced (GDP), contributes to the creation of 1 out of

10 jobs and represents 7% of all international trade and 30% of the world's export in services, surpassing oil exports, food products or even automobiles ((UNWTO), Tourism Highlights, 2018). The sector is also an important source of foreign direct investment (FDI), which often results in improvements in infrastructures (airports, roads etc) that are enjoyed by tourists and locals alike ((WB), Tourism for development, 2017).

Social inclusiveness, employment and poverty reduction: One of the primary sources of employment and income creation, the sector provides an important source of revenues for local communities and an instrument for advancing poverty alienation. In line with this, tourism contributes to social inclusiveness, helps reducing inequalities and empowers local populations through the provision of jobs, which benefits particularly women and youth (BMZ & sector, 2012).

Resource efficiency, environmental protection and climate change: Tourism can also have a positive impact on resource efficiency, environmental protection and climate change. Tourism being an energy intensive sector, it can foster responsible consumption practices and accelerate the shift towards an increased use of renewable energy. In addition, it can contribute to enhance and preserve wildlife and natural biodiversity (Mowforth & Munt, 1998).

Cultural values, diversity and heritage: Tourism plays a crucial role in safeguarding and promoting cultural values and assets. When involving the local community, tourism can also contribute to strengthening a sense of community and local pride, which in return helps preserving the authenticity of the destination ((WB), Tourism for development, 2017).

Mutual understanding, peace and security: By connecting people from diverse cultures, tourism spurs dialogue and fosters mutual understanding, laying the foundations for more tolerant and peaceful societies which is particularly relevant in post-conflict areas.

It is also worth mentioning that the benefits of tourism development efforts are often seen and counted as part of other sectors (Such as trade, transports or agriculture), rather than as exclusively part of tourism for local socio-economic development. Therefore, the development impacts of tourism are sometimes not only difficult to measure, but also to attribute to tourism development (Hummel, 2015).

Sustainable development: an evolving agenda

The above-mentioned contribution of the sector has been recognized by the international community in the past years as demonstrated by its inclusion in the development agenda. In 2012, tourism was identified by the United Nations (UN) as one of the ten sectors to drive the change towards a Green Economy and was included in the Rio+20 Outcome Document as one of the sectors capable of making “a significant contribution to the three dimensions of sustainable development, has close linkages to other sectors, and can create decent jobs and generate trade opportunities” ((EC) & UNWTO, 2013).

With the adoption of the 2030 Agenda for Sustainable Development in 2015 and the Sustainable Development Goals (SDGs), the sector was explicitly identified as fundamental for the achievements of the Sustainable Development Goals (SDGs) 8, 12, and 14 ((WB), Tourism for development, 2017). Yet, given the cross-cutting nature of the sector¹, it is broadly argued that tourism has the potential to contribute – directly or indirectly – to all 17 SDGs and, more broadly speaking, to the 2030 Agenda for Sustainable Development ((UNWTO), Tourism for Sustainable Development in Least Developed Countries, 2017).

This recognition reached its peak with the designation by the United Nations of 2017 as the International Year of Sustainable Tourism for Development (IY2017), which sought to promote awareness and the pursuit of sustainable tourism in all countries, whatever their development status. The World Tourism Organization (UNWTO) was mandated to facilitate its implementation, in collaboration with a range of key players – governments, international bodies, the private sector, academia, civil society, the media and others.

¹ Research has shown that tourism creates vital forward and backward linkages with other sectors of the economy. This illustrates the extent to which tourism has a multiplicity of stakeholders and shows that governments have to address both horizontal issues (across agencies responsible for transport, infrastructure, regional development, immigration and customs, education and training and so on) and vertical issues (from the national level through, to the provincial, regional and local levels of government) in the design and execution of tourism-related policies and programmes ((OECD), *Tourism Trends and Policies 2010*, 2010)

Potential trade-offs of tourism

Despite of the above, tourism can also present some important tradeoffs which ought to be correctly considered. When poorly planned and managed, tourism can negatively impact cities, parks, and historic monuments, and put severe pressure on local infrastructure, resident communities, and resources, a phenomenon that is commonly defined as *overtourism* ((UNWTO), *Overtourism? Understanding and managing urban tourism growth beyond perceptions*, 2019). As stated by the United Nations Environment Programme, tourism can also have a negative impact on the locals' identity, cause ethical issues such as sex tourism or child exploitation, and endanger the local biodiversity. In addition, it is fundamental to ensure that the benefits of the tourism activity are correctly distributed to the local communities, which is not necessarily always the case (OECD, 2013).

Despite some potential tradeoffs that need to be carefully considered, tourism is today increasingly acknowledged as a powerful tool for development which explains the rising interest of the international aid community on implementing tourism-related projects.

II. Tourism and aid

Brief history of tourism for development

The use of tourism as a development cooperation instrument is relatively recent. In the 70's and 80's, tourism was still perceived with great skepticism by aid professionals who considered that it excluded the most vulnerable populations and could therefore not be considered as an adequate tool for fostering development. However, this perception changed drastically in the 90's with the recognition of its contribution to rural development (Hummel, 2015), the apparition of *pro-poor tourism methods* and the incorporation of the World Tourism Organization to the United Nations system in 2003 (Gascón, Morales, & Tresserras, 2013). Since then, tourism has been gradually incorporated in the programme of work of many development aid actors.

Overview of aid and tourism

The development aid actors involved in tourism-related projects are international organizations, development agencies of government, NGOs and the private sector, whose fundamental contribution to the advancement of sustainable development is today increasingly acknowledged. Interestingly, the way of working of these organizations has changed over the years from a focus on small-scale tourism and interventions in poor communities in the second half of the 1990s, to an inclusive destination development approach focusing on market development, using multi-stakeholder and value chain development approaches, involving the private sector, at the end of the 2000s (Gascón, Morales, & Tresserras, 2013).

Principal instruments

Given its cross-cutting effect, a wide variety of instruments can be used to boost the development of tourism. The German Cooperation Agency (BMZ) has summarized them in the below categories (BMZ & sector, 2012):

- **Policy advice** for the tourism industry, associations, ministries and NGOs;
- **Destination development:** research studies, branding, recompilation of data, social and ecological requirements;
- **Concept development:** local or national tourism plans, product development, market analysis, development of certification systems;
- **Business management and economic development:** access to and provision of micro-credits and funding, promotion of trade fair and local businesses;
- **Regional and resource management:** regional planning/development, advices to mitigate the impacts of tourism on natural resources (Water and waste management);
- **Training & capacity building:** enhancing local governance, quality of services, tourism educational programmes;

Of course, these instruments can be used interchangeably by all the above-mentioned stakeholders. When financed with funds channeled from the budget that countries allocate for development cooperation, these instruments are computed in the official

aids flows compiled by the Organization for Economic Cooperation and Development (OECD).

Tourism in Official Development Assistance (ODA) flows

Despite the recognized potential of tourism to achieve development imperatives, tourism has traditionally not received much support in official aid flows. According to data from the OECD on commitments and disbursement of Official Development Assistance flows², total Aid for Trade³ disbursements to the tourism sector were approximately USD 402 million in 2017, representing only a 2% of the production sectors and far behind *Agriculture, forestry and fishing* which accounted for 71% of ODA ((OECD), ODA data, 2019). Major aid actors in tourism include both international organizations, international development banks and bilateral agencies, the most important being, by far, the Japan International Cooperation Agency (JICA), the EU Institutions and the International Development Bank (World Bank) (See Annex 1).

Taking in account that tourism represented on average around 4% of GDP in low income countries, the sector appears to be underrepresented when it comes to Aid for Trade flows ((UNWTO), *Tourism for Sustainable Development in Least Developed Countries*, 2017). The existence of backward linkages in tourism, explained earlier, could also provide an explanation to as why the amount of tourism ODA is relatively low, given that some projects focusing on tourism infrastructures or transport could be computed under these categories rather than under tourism (OECD, 2013).

Despite of the above, the general trend of the share of ODA directed to tourism is increasing as it was multiplied by eight over the period 2008-2017 ((OECD), ODA data, 2019), which reflects the growing recognition of tourism as a tool for development. This could be reinforced in the future given the recent inclusion of the World Tourism Organization (UNWTO) in the list of ODA - eligible International Organizations by the

² Official development assistance (ODA) is defined by the OECD Development Assistance Committee (DAC) as government aid that promotes and specifically targets the economic development and welfare of developing countries. Loans and credits for military purposes are excluded. Aid may be provided bilaterally, from donor to recipient, or channelled through a multilateral development agency such as the United Nations or the World Bank ((OECD), ODA data, 2019)

³ Aid for Trade is about helping developing countries, in particular the least developed, to build the trade capacity and infrastructure they need to benefit from trade opening. It is part of overall Official Development Assistance (ODA) — grants and concessional loans — targeted at trade-related programmes and projects ((WTO), 2019).

OECD Development Assistance Committee (DAC) ((UNWTO), OECD includes UNWTO in the list of Development Assistance Organizations, 2017), which undoubtedly reaffirms the role that UNWTO can play.

III. The work of UNWTO in tourism for development

Brief history of UNWTO

The World Tourism Organization (UNWTO) was formally established in 1970, stemming from the previously created International Union of Official Tourist Publicity Organizations (IUOTPO). At the fifteenth general assembly in 2003, the WTO general council and the United Nations agreed to establish the WTO as a specialized agency of the United Nations, a clear recognition of the fact that “*tourism [should] be considered on an equal footing with other major activities of human society*”, in the words of the then organization’s Secretary General, Mr. Francisco Frangialli (Wikipedia, 2019)

As the leading international organization in the field of tourism, UNWTO’s role is the promotion of tourism as a driver of economic growth, inclusive development and environmental sustainability and offers leadership and support to the sector in advancing knowledge and tourism policies worldwide. UNWTO’s membership includes 158 countries, 6 Associate Members and over 500 Affiliate Members representing the private sector, educational institutions, tourism associations and local tourism authorities. The main priorities of the organization include mainstreaming tourism in the global agenda, improving tourism competitiveness, promoting sustainable development through policies, maximizing the contribution of tourism to the SDGs’ by making tourism work as a tool for development, fostering education and training in tourism and build partnerships in tourism ((UNWTO), 2019). The Organization plays therefore an important role in advancing the contribution of tourism to sustainable development through advocacy, research and, of course, technical cooperation activities.

The work of UNWTO in tourism for development

The implementation of tourism-related development projects is mostly handled by the UNWTO Technical Cooperation and Services department, which focuses on meeting

the specific needs of the Member States and to support them in their efforts to develop and promote the tourism industry as an engine for socio-economic growth and poverty alleviation. The work of UNWTO in this field dates back to 1978, resulting in the implementation of over 120 sustainable tourism projects in Africa, Latin America, Asia, Europe and the Middle East, always in close collaboration with national tourism authorities, local governments, NGOs, development organizations and tourism enterprises in the beneficiary countries ((UNWTO), Making tourism a tool to fight poverty: ten years of the ST-EP initiative, 2017).

The development of tourism projects takes into account both the needs and requirements of UNWTO Member States and the capacities of UNWTO in terms of resources and expertise. Within technical assistance, the main services provided are consultancy and training activities (See Table 1). While some short-term missions focus on providing policy advice on a specific topic, other long-term projects aim at supporting Member States in acquiring technical know-how and fostering the regional development of tourism in a specific area. All the beneficiaries of development projects are Official Development Assistance (ODA) recipients and of these, half are least developed countries (LDCs) ((UNWTO), About Technical Cooperation and Services, 2019).

Table 1: UNWTO Technical Product Portfolio

Category	Specific areas of action
Policy planning and economic development	Assistance in the development of tourism policy, tourism Master Plans, tourism physical planning, tourism legislation, value chain analysis etc..
Human resources development	Manpower planning, capacity building programmes for both authorities and private sector representatives
Product development, marketing and promotion	Assistance in the development of marketing and promotion plans, product development and diversification
Statistics and quality standards	Support in the collection and analysis of tourism statistics, elaboration of classification systems etc..

Source: ((UNWTO), About Technical Cooperation and Services, 2019)

Financing tourism for development: a challenge

Funds required for financing development projects come from extra-budgetary resources, which implies that they are not part of the annual membership contributions received by UNWTO Members. The need for exploring new and innovative ways to increase UNWTO's regular budget and extra budgetary resources was identified as a priority for the Organization on the occasion of the 108th session of the UNWTO Executive Council, which pointed out the importance of increasing, among others, international public finance for tourism, including through ODA, Aid for Trade (AfT) and Foreign Direct Investment (FDI) ((UNWTO), 2017).

Although the challenges faced by UNWTO will be addressed more in details in the following parts, this preface gives us a glance of possibly what is the main challenge faced by UNWTO: resource mobilization. Just as other aid actors that do not have a regular budget dedicated to the implementation of projects, UNWTO needs to secure funds from donors to implement projects. This affects in turn the resources available to implement a project, and consequently its duration, impact and, possibly, its quality. It also necessarily implies that UNWTO needs to compete with other aid donors in securing the funds – a challenge that lays the foundation of the question addressed in this paper.

IV. Objective of this paper and delimitation of the scope

I have been working for four years at the World Tourism Organization (UNWTO), in the Regional department for Europe. Within the context of development aid, our work consists in facilitating the channeling of funds from both a bilateral and multilateral perspective across Europe. Yet, we face the challenge of securing funds for development related projects in the Europe region, where UNWTO does compete with a wide variety of actors involved in development (Both European and non-European, traditional and emerging actors etc) in the mobilization of funds.

Within this context, the principal objective of this study will be to examine the competitive advantage of UNWTO in comparison to other aid actors, which is

particularly relevant considering the leading role that the Organization wishes to play. Therefore, the specific objectives of this study will be:

- Draw a detailed profiles of the main development donors, both multilateral and bilateral, involved in tourism related activities in Uzbekistan.
- Define the competitive advantage of UNWTO and the role it can play within the international development for tourism community
- Provide an analysis of how UNWTO can position itself to add value in response to national needs and changes in the national development context in Uzbekistan;

For simplicity reasons, the focus of this study will be centered on the country of Uzbekistan, because the country is part of the Region of Europe within UNWTO - the department where I work – and because it is today recognized as a country with strong tourism potential, considering the recent increase in the number of arrivals. Yet, the development of the tourism sector in the region is still at a fairly preliminary stage as reflected by the level of tourism infrastructures, policies and existing regulations. This explains the rising involvement of many aid actors in tourism-related projects. Lastly, it is a region where, as of today, UNWTO is still not active and where it wishes to extend its actions.

V. Methodology

The methodology used for this research will combine on one hand academic research through the revision of existing literature and publications, and the conduct of interviews to complement the findings.

The first phase, which will focus essentially on identifying the challenges of the sector and draw an overview of development for cooperation through tourism in Uzbekistan. The second phase will focus on defining the main donors and their profiles. For this, a more practical approach will be used, consisting in using existing publications, web-based sources and but also on conducting interviews (first source) to major actors that

could provide some interesting insights on the sector. Interviews were conducted to the following representatives:

- Representative of the State Committee for Tourism Development, Government of Uzbekistan
- Representative of the European Bank for Reconstruction and Development (EBRD) office in Tashkent, Uzbekistan
- Representative of the United Nations Coordinator office in Tashkent, Uzbekistan
- Representative of United Nations Educational, Scientific and Cultural Organization (UNESCO) office in Tashkent, Uzbekistan
- Representative of Japan International Cooperation Agency (JICA) office in Tashkent, Uzbekistan
- Representative of the Regional Department for Europe, UNWTO
- Representative of the Institutional relations and partnerships, UNWTO

The compiled information will, hopefully, allow us to have a clearer image of the overview of development through tourism and define the competitive advantage of UNWTO. It is worth saying, through the whole process, feedback will be naturally requested from professionals including my thesis tutor and more experienced colleagues at UNWTO.

VI. Research

I. Country context

History

Uzbekistan is a resource-rich, doubly-landlocked country, strategically located in the heart of Central Asia (See Annex 2). The country, which was once at the heart of the ancient Silk Road trade route connecting China with the Middle East and Rome, spent most of the past 200 years as part of the Russian Empire, and then of the Soviet Union, before emerging as an independent state in 1991 (See Annex 3). After years of rigid, state-controlled economy, priority was given to the economic liberalization of the

country, which resulted in the launch of an ambitious and unprecedented national program of market-oriented reforms in 2017, which is designed to achieve greater economic, social and political openness and build a competitive and market-oriented economy in Uzbekistan.

As a result, the country has been experiencing a continued growth for the past decade (See Annex 5), which is predicted to converge to 6% by 2021 (BBC, 2019). This improvement is also reflected in the improvement of Uzbekistan's ranking in the World Bank's Ease of Doing Business index, which jumped from 141st out of 190 countries in 2015, to 74th in 2018 (Russel, 2018). Today, the country still relies heavily on the agriculture and the industry, as demonstrated by the distribution of the contribution of main sectors to the national GDP (See table 2).

Table 2: Break-down of main sectors according to contribution to GDP

Sector	Contribution to GDP (in %)
Agriculture	18.5%
Industry	34.4%
Services	47%
Tourism	0,9%

Source : (mundi, 2018)

Geography

Uzbekistan is rich in natural resources, being home to important reserves of gold, natural gas and hydrocarbons⁴. Despite being energy self-sufficient, Uzbekistan's ageing electricity infrastructure and network underinvestment have led to electricity shortages, inefficiency, high losses and low reliability. At the same time, growing domestic and international demand for gas and oil exports have put pressure on the country to increase production. Today, the country has an increasing need for improving the existing energy infrastructures, a crucial point considering the country's long-term goal of becoming an industrialized middle-income economy by 2030 (EU, 2016).

⁴ *The country occupies the fourth place in stocks of gold, tenth place in copper stocks, and eighth in uranium stocks. In addition to this, Uzbekistan is the fifth-largest producer of cotton and the second-largest exporter of cotton in the world ((MFA), 2019)*

Paradoxically, the country is also willing to move away from commodity-based growth strategies to market-oriented diversification, as reflected by the adoption of a broad spectrum of economic, institutional and political reforms (Batsaikha & Dabrowski, 2017). In addition to this, the country faces a number of environmental issues compounded by the country's geography and climate, by its rapidly-increasing population, and by its economic activities (See Annex 4).

Development

Today, the country has a population of about 32 million, approximately half of which lives in rural areas. Uzbekistan's population accounts for approximately 46 per cent of Central Asia's population of 68 million people.

Table 3: Key numbers of Uzbekistan, 2018

Category	Data
Population, million (2017)	32.9
Capital	Tashkent
Major languages	Uzbek, Russian, Tajik
Major religion	Islam
GDP, current USD billion	49.7
GDP per capita, current USD	1,535
IDH	0.71 (Rank: 105 th)
Life expectancy at birth, years	71.3

Source: ((WB), The World Bank in Uzbekistan, 2019)

In the last decade, Uzbekistan has achieved significant progress in reducing low income rates and tackling malnutrition (See table 3), triggered by important efforts put in place by the Government and international partners on implementing effective health care programs, educational programmes and measures to foster the creation of jobs. As a result, the country was reclassified by the World Bank from a low-income to a lower middle-income nation in 2011, the national poverty rate decreased from 27.5 per cent in 2001 to 12.8 per cent in 2015, and the human development index (IDH) increased from 0.61 in 2006 to 0.71 in 2017 ((UNDP), 2019).

Today, the main challenges the country faces are high unemployment which touches in particular young people ((WB), Uzbekistan Economic and Social Reforms Building

Better Opportunities for People, says World Bank Regional Vice-President, 2019), low wages and a high disparity in living standards between rural and urban areas, which resulted in a mass labor migration to Russia and Kazakhstan. Other pressing issues include the need to improve adherence to human rights principles, ensure access to justice for vulnerable groups, and promote gender equality (Amnesty, 2019).

Tourism in Uzbekistan

Tourism growth and evolution

The sector of tourism in Uzbekistan has experienced a sustained growth in the last decade, as demonstrated by the increase in both the arrivals of tourists and tourism receipts (See table 4). While 92,000 tourists crossed its borders in 1995, this number was multiplied by 20 in 2017 ((UNWTO), UNWTO Barometer, 2019). In 2014, the largest source markets were the Russia Federation, the Republic of Turkey and the Republic of Korea ((UNWTO), 2015).

Table 4: Evolution of tourist arrivals and tourism receipts in Uzbekistan, 2000 – 2018

Year	2000	2010	2015	2017	2018
Tourists arrivals (in 1000s)	302.0	975.0	1,918.0	2,690.0	N.A.
Receipts (In USD million)	27	121	458	689	1,144

Source : ((UNWTO), UNWTO Barometer, 2019)

In 2017, the direct contribution of the sector to the national GDP was 0.9% and summed up to 2.8% of the GDP if taking into account the indirect effects, equivalent to 275 million USD and 830 million USD, respectively. The sector also supported 2.4% of total employment corresponding to 305,000 jobs. Investment in tourism corresponded to 2.1 % of total investment and is expected to rise by 4.6% over the next ten years (WTTC, 2018). These numbers reflect the growing importance that tourism is expected to have in the next years, although its contribution to the economy today is still relatively low.

Tourism assets

Uzbekistan boasts a large variety of tourism assets which reflect the important potential for development. The country has one of the most favorable climates in Central Asia and is home to luxuriant mountains such as the dominant Greater Chimgan peak (3,309 m) and desert regions. In addition to these, one of the most important tourism assets of the country is its rich cultural heritage stemming from its ancestral history, mostly related to the Silk Road. Uzbekistan has over 7500 historic sites and 10 major towns, the most famous ones being the cities of Tashkent, Samarkand – central Asia’s primer tourist attraction -, Bukhara and Khiva. Uzbekistan is also home to one natural and four cultural UNESCO World Heritage Sites (Atlas, 2017).

From a tourism perspective, the above-mentioned natural and cultural assets offer significant potential for the development of tourist attractions. Today, the principal tourism segments developed are, predominantly, cultural tourism, religious tourism and nature tourism, which offer activities such as hiking, skiing, fishing and wildlife watching. Additional segments, which are relatively not so well-developed, include gastronomy tourism and wine tourism.

Tourism, an increasing priority for the Government

Tourism was identified as a priority sector⁵ in the National Development Strategy for the period 2017-2021. As a result, important measures were put in place, spanning from reductions in tax-rates, facilitation of the administrative procedures, measures to foster entrepreneurship and the very-welcomed simplification of visa procedures. The introduction of an electronic visa system in July 2018 and the expansion of list of countries whose citizens have access to a 30-days visa-free access were saluted by the international community (Diplomat, 2019). In addition to this, the country organized the first edition of the International Investment Forum in Tourism in Tashkent in November 2018, with the aim of attracting foreign investments and aid in tourism in the country.

⁵ *Tourism is under the authority of the State Committee for Tourism Development, a state body, formed in 1992 by a Presidential Decree of the Republic of Uzbekistan, carries out the state program on the development of international and domestic tourism.*

On this occasion, Deputy Prime Minister Aziz Abdukharimov announced the “*ambition of the country to become a major tourism destination*” (Daily, 2018).

Challenges

Although several reforms have been put in place lately to enhance the economic development of the country, including through a stronger Central Asia regional cooperation (Russel, 2018), the tourism sector is still facing important challenges that hinder its development. The Decree of the President of the Republic of Uzbekistan of August 2017 on “Priority measures for the development of tourism for 2018-2019” gives an overview of the challenges faced by the country in tourism development, complemented by the insights of the interviews. These can be summarized in the following categories:

- **Infrastructures & energy supplies:** Despite notable improvements in the last years, including the construction of airports and introduction of the first regional high-speed train of Central Asia, the country still needs improvement in the development of its infrastructures, mainly energy facilities, transports and roads facilities (Bobur Sobirov Baxtishodovich, 2017). These were also identified as challenged by the representatives of the State Committee for Tourism, EBRD, the UN and UNESCO.
- **Tourism facilities:** Although some important improvements took place recently, efforts are still needed to build and improve existing tourism sites and accommodations, in particular along historic sites, as highlighted by the representative of UNESCO, EBRD and the Government.
- **Tourism offer:** Efforts are needed to develop new and innovative tourism products, along with enhance promising segments, as defined by the representative of the Government.
- **Quality of services:** In addition to a lack of quality standards and certifications, Uzbekistan faces a lack of qualified personnel in tourism and poor tourism educational programmes, which affect the overall quality of the service.
- **Connectivity:** Established airline tariffs are still high, worsen by a low coverage of potential markets by domestic and international airlines. National airline and railway system are still State-owned, which tend to inflate the prices.

- **Promotion of the country:** Despite being widely known in Russia and neighboring countries, Uzbekistan is still relatively unknown in Europe and other Asian markets – two potential sources market. Although the country implemented a promotion strategy in 2014, efforts are still needed to build a stronger brand and improve the perceptions of potential visitors (González, Araujo, & Kim, 2016).
- **Insufficient regulatory framework:** Despite some improvements, important administrative barriers still the attraction of foreign investments (Germany, 2018) and improvements are needed in the legislative frameworks, as outlined by the representative of the Government.

The tourism sector in Uzbekistan has been undergoing significant developments in the last years, encouraged by the will of the Government to prioritize its development. It is worth noting that this strong interest can also harm the sustainability of the development of the sector, as demonstrated by the recent case of the destruction of the cultural site of Shahrisabz, heavily criticized by the international community (Synovitz, 2017). Measures are being taken in this regard, as confirmed by the representative of UNESCO.

Tourism in Uzbekistan offers great opportunities for development which, along with the existing challenges that need to be addressed, explains the strong interest demonstrated by foreign investors but also from the international aid community.

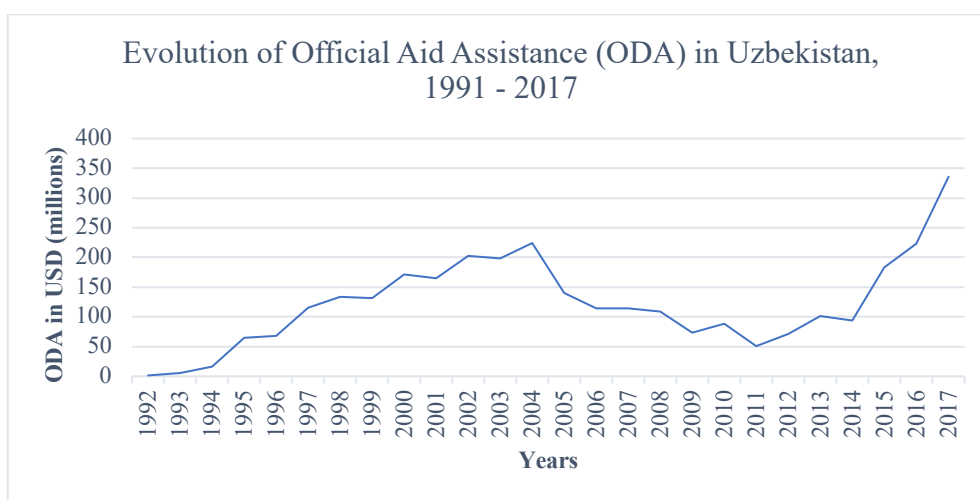
II. Aid for development in tourism in Uzbekistan

Overview of aid for development

The end of the Soviet Union in 1991 marks the beginning of a growing involvement from aid actors, who recognize both the development needs, economic opportunities and the strategic position of the country. Between 1995 and 2017, the total amount of the net Official Development Assistance provided to Uzbekistan was multiplied by seven, reaching today 335.85 million USD, a clear demonstration of a growing interest

from the international community (See Figure 1). In 2017, an estimated 55.2% of the total ODA came from bilateral funding, reflecting the balanced involvement of both bilateral and multilateral actors (OECD, ODA data, 2019).

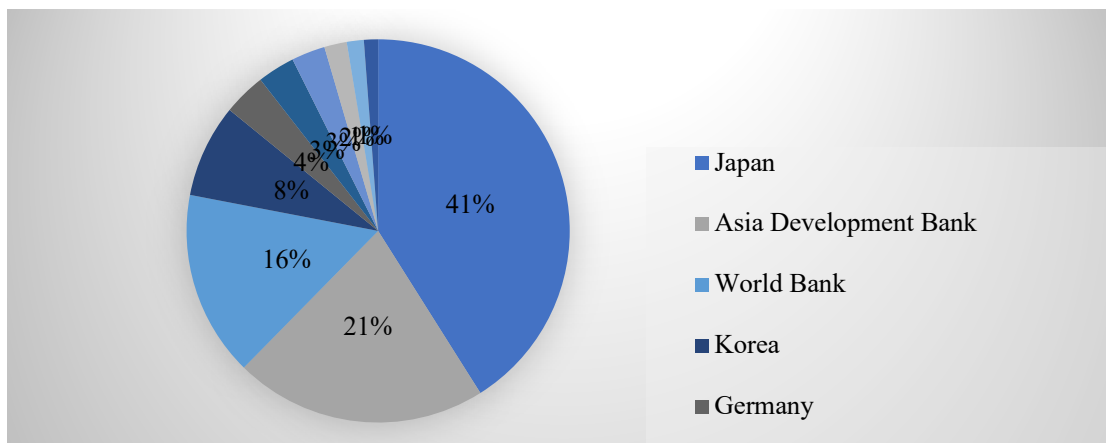
Figure 1: Evolution of Official Aid Assistance (ODA) in Uzbekistan, 1991-2017



Source : ((OECD), ODA data, 2019)

The principal aid actors implemented in Uzbekistan were, in 2016-2017, the Japan International Cooperation Agency (JICA), the Asia Development Bank (ADB), the International Development Association (Part of the World Bank), and the Korea International Cooperation Agency (KOICA), the four of them accounting for 87% of the total ODA received by Uzbekistan for the period 2016-2017 (See Figure 2).

Figure 2: Distribution of top ten donors of Gross ODA for Uzbekistan, 2016-2017 average, USD million



Source : ((OECD), ODA data, 2019)

On this note, it is important to consider that these numbers only reflect development actors that reported their contributions to the OECD. Additional important multilateral aid actors, such as other development banks and international organizations, along with bilateral aid actors, such as China, Russia, and the growing influence of new emerging actors like Iran or Saudi Arabia and the United Arab Emirates, are not correctly reflected in the above table (Bajrektarevic & Brletich, 2016).

The principal recipient sectors of bilateral ODA were *Economic infrastructures*, which accounted for 57% of the total amount, along with *Other social infrastructures* and *Education*, which accounted for 21% and 10% of ODA respectively (OECD, ODA data, 2019) (See table 5). An interesting point is that, not surprisingly, these are in line with the above-mentioned development needs of the country, the corresponding priorities set by the Government.

Table 5: Distribution of sectors receiving ODA, Uzbekistan

Main sectors receiving ODA, Uzbekistan, 2016-2017 average	
Education	10%
Health and Population	4%
Other social infrastructures	21%
Economic infrastructures	57%
Production	5%
Multisector	2%
Programme assistance	0.08%

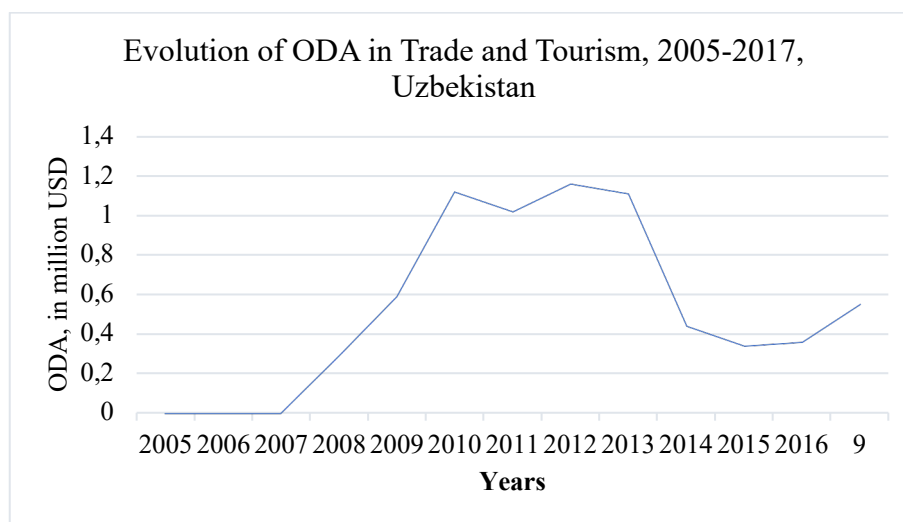
Humanitarian aid	0.06%
Other	0.76%

Source : ((OECD), ODA data, 2019)

Aid for development in tourism

The first reference of development projects related to tourism dates back to the mid-90s, where UNESCO started implementing related to the enhancement of cultural sites, as indicated by the representative of UNESCO. ODA data reported to the OECD, specifically for the category Trade & Tourism, are only available for the period 2005-2017. They do, however, provide a fair depiction of the increase of interest that has taken place in the last ten years. As it was expected, the share of tourism in comparison to total ODA is relatively low, as tourism only accounted for 0.38% of total ODA in 2017. However, this represents the double of the amount spent in 2008 (See Figure 3), and interviewed representatives from EBRD, the UN Office and JICA expect it to grow in the next years.

Figure 3: Evolution of ODA in Trade and Tourism, 2005-2017, Uzbekistan

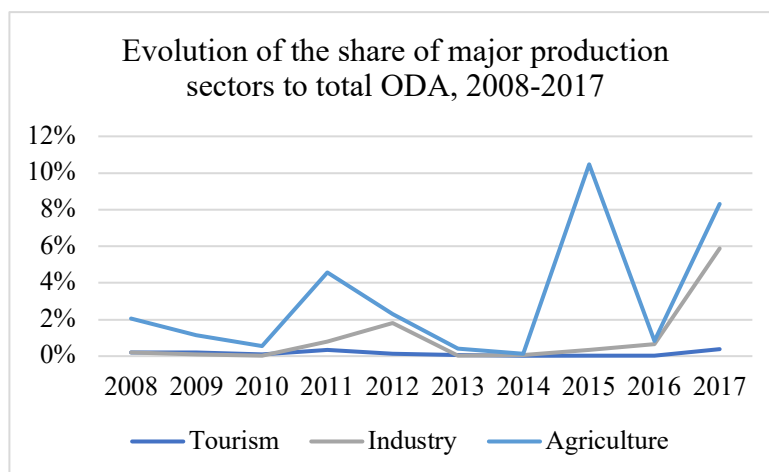


Source : ((OECD), ODA data, 2019)

Another interesting point is the fact that, over the years, the share of tourism to total ODA has remained fairly steady, which is not necessarily the case of other more volatile production sectors such as industry and agriculture (See Figure 4). This may indicate

that the recognition given to the sector, even if relatively low, is not affected by external factors.

Figure 4: Evolution of share of major production sectors to total ODA, 2008-2017



Source : ((OECD), ODA data, 2019)

On this note, it is important to note that ODA data reported to the OECD for tourism only takes into account bilateral aid actors as multilateral aid actors did not report to the OECD, although we know that some of them are active in tourism. It is also important to note that data are only available until 2017, which coincides with the entrance of major aid actors in tourism, such as EBRD. This recent interest is therefore not yet reflected in the OECD data. In addition, as explained earlier, these data most probably do not take into account tourism-related projects which are accounted under other ODA categories. These imply that the share of tourism-related projects in development is, most likely, more important than what is reflected in the above graphs.

Main aid actors in tourism in Uzbekistan

The identification of major aid actors in tourism in Uzbekistan was done through a compilation of information including the ODA data, academic review and the insights of interviewed experts. Major current aid actors involved in tourism can be classified in the following groups: development banks, international organizations and bilateral agencies.

The OECD data gives us an estimate of the most important bilateral actors (See table 6), which were confirmed by the representative of the Government of Uzbekistan. To these, we should add multilateral actors which were identified thanks to the input gathered from the representative of the Government of Uzbekistan.

Table 6: Distribution of contribution of ODA of major bilateral agencies to tourism, average 2015-2016

Bilateral agencies	ODA, in millions USD
Japan	0,24
Korea	0,29
United States (USAID)	0,02

Source : ((OECD), ODA data, 2019)

Due to the limitation of this paper, the evaluation of major aid actors was done based on a specific selection which will allow us to draft recommendations. Chosen actors include main international development banks (The World Bank, the Asia Development Bank and the European Bank for Development and Reconstruction), international organizations (the European Union and the United Nations), and bilateral cooperation agencies (the Japan International Cooperation Agency (JICA) and the Korean International Cooperation Agency (KOICA). Detailed information on mentioned actors can be found in Annex 6.

I. Multilateral development banks

The principal multilateral development banks⁶ involved in tourism in Uzbekistan are the World Bank (WB), the European Bank for Reconstruction and Development (EBRD) and the Asia Development Bank (ADB). The instruments used in tourism are, just as with any other sectors, funding instruments (loans, grants, lines of credit, guarantees and equity), and technical assistance. Not surprisingly, the largest sectors supported by banks are infrastructures, but they are also gradually involved in other social issues such

⁶ Multilateral development banks focus essentially on fostering economic and social progress in developing countries by financing projects, supporting investment and generating capital for the benefit of all global citizens. These supranational institutions are set up by sovereign states which are their shareholders and define the development aid and cooperation policies to be followed by the bank. They also play a major role on the international capital markets, where they raise the large volume of funds required to finance their loans. The main instruments used by multilateral development banks include (EIB, 2019).

as education, health, but also governance, agriculture, energy and, more recently, tourism (EIB, 2019)

Multilateral banks have traditionally offered an interesting option for the Government of Uzbekistan. The banks' important funding capacities⁷, along with their expertise, allow the financial institutions to intervene in a wide scope of actions and contribute to the integral development of a region. Their strong local presence, close relations with local stakeholders, both private and public, but also with other international institutions explain the recent strong involvement of multilateral banks in tourism in Uzbekistan, which we can expect to increase in the next years. In tourism, the lack of specific expertise was identified by the representative of EBRD and UNESCO as a principal challenge, which forces them to hire external consultants or collaborate with other partners (See table 7).

Table 7: Identified strengths and weaknesses of multilateral banks in tourism in Uzbekistan

Strengths	Weaknesses
Strong local presence and strong link with local stakeholders, including the government and aid actors	Traditional focus on infrastructures
Strong financial and human resources	Lack of specific expertise in tourism
Wide scope of action (Integral development project)	Economic vision of development
Close link with both the private sector which is crucial for the development of the SDGs.	Relatively recent involvement in the country for EBRD

II. International organizations

Selected international organizations involved in tourism in Uzbekistan include the United Nations and the European Union. International organizations mostly provide technical assistance in a wide range of areas (Health, education, poverty reduction etc) and act as donors, funding projects to other implementing agencies. They usually offer an interesting option due to their important resources, capacity to act in several areas of

⁷ Funds used for projects come both from the banks' reserves, but also from donors such as the EU, JITA, USAID and Canada in the case of Uzbekistan, as confirmed by the representative from EBRD.

action but also their political neutrality, which is not always the case with bilateral agencies.

III. Bilateral agencies

Bilateral development agencies⁸ have been involved in Uzbekistan since 1991, coinciding with the establishment of diplomatic relationships between Uzbekistan and foreign countries. Just as multilateral actors, bilateral development agencies invest in a wide scope of areas such as infrastructures, energy, governance and social issues through loans, grants and technical assistance. Bilateral assistance is often rooted in cultural and ideological similarities and the desire for enhancing existing relations with a strategic region, most commonly for closer economic cooperation and/or regional stability (Bajrektarevic & Brletich, 2016).

In this regard, the recent economic growth of Uzbekistan, along with its large natural resources and strategic location has triggered the interest of many bilateral agencies, the most active in tourism being the Japan International Cooperation Agency (JICA) and the Korea International Cooperation Agency (KOICA). Interestingly, engaging in the development of the tourism sector paves the way for the establishment of commercial relations within this sector, just as agriculture or industry do. Tourism can also serve as a diplomatic tool by serving as a demonstration of the willingness of both countries to strengthen their ties by facilitating the entry of citizens from determined regions.

Detailed information on analyzed aid actors can be found in the Matrix of aid actors in Annex 7, along with their identified strengths in Annex 8. The analysis conducted allowed us to determine the principal strengths of aid actors, along with providing us some interesting findings on the aid in tourism area in Uzbekistan and potential recommendations for the work of UNWTO.

⁸ Bilateral development agencies finance projects that contribute to the economic and social development of recipient countries. Unlike international financial institutions, bilateral agencies are responsible to a single government and are often part of a government ministry (Commissioner, 2019).

IV. Main findings

Trends and challenges

The review of the main aid actors involved in tourism in Uzbekistan allowed us to understand better the dynamics shaping the sector. Principal trends and challenges were identified through the conducted and the insights provided during the interviews. Main findings are described below.

1. Aid in Uzbekistan is growing

The recent opening of the country and strong will of the Government to foster its economic development explains the increasing involvement of aid actors over the last two years. The recent public reforms and economic liberalization process in place triggered the interest of new actors, in particular from multilateral banks such as EBRD. Although such involvement is not yet reflected in the latest OECD numbers, we can expect aid in Uzbekistan to significantly increase in the next years, in particular considering the important improvements that are still needed across all sectors including infrastructure, energy, health and education.

2. Tourism as a sector within aid in Uzbekistan is growing

While most of the aid actors have been implemented in Uzbekistan for over twenty years, they started getting involved, or increased their involvement, in tourism-related projects two years ago, as reflected by the inclusion of tourism in the latest donors' agreements and action plans (See Annex 6). The increasing interest in tourism was also confirmed by the representatives of EBRD, UNESCO and JICA. Given these points, we can expect tourism as an area within development to take an increasing role in the upcoming years.

3. The landscape of aid in tourism is changing

Considering the strong emphasis put on economic development, the above-mentioned needs will most probably trigger the interest of emerging aid actors, above all from new

development banks, such as the Islamic Development Bank. These will most probably also consider tourism as a new area of action considering the interest of the Government. In addition, we can also foresee the increasing involvement of bilateral cooperation agencies from countries interested in strengthening their ties with Uzbekistan, whose strategic location, natural resources and recent economic development is today raising the interest of many countries.

It is worth noting that the tourism development needs of the country will determine the type of instruments that will be used. We can therefore expect a strong emphasis on loans and projects aimed at building tourism infrastructure in a first stage, before gradually giving more importance to technical assistance projects through capacity building activities, among others.

4. The government plays a key role in defining the development needs, but also, and increasingly, the private sector

The principal counterpart of most aid actors is the Government, which defines the needs to be addressed, but also recommends partners that could be included in the projects as explained by the representative of the UN. Interestingly, the private sector plays a key role for development banks such as EBRD, which is extremely relevant for a sector such as tourism. As mentioned by the representative of EBRD, the private sector indicated to the bank specific needs that needed to be addressed within tourism such as infrastructures development, facilitating funding opportunities for small and medium enterprises or fostering capacity building activities.

5. There is little coordination among aid actors

The interviews conducted with EBRD and UN coordinator highlighted the fact that there is no formal coordination mechanisms in place, and even less in tourism. While we've been informed by the UN coordinator that coordination among donors was regulated by law before 2016, there is no regulation identifying the entity within the Government responsible for aid coordination today. Some coordination efforts are undertaken separately by aid actors who try to coordinate their own sphere of action, such as the UNDAF or the World Bank's Multi-donor trust funds, which facilitate the

coordination of a joint response in specific areas (water, agriculture..) ((WBG), 2016), but nothing has been organized so far for tourism as confirmed by many of the representatives.

6. Coordination among aid actors in tourism is limited

Coordination among aid actors in tourism is limited for various reasons. Firstly, tourism is a relatively new aid sector, which explains why coordination groups have not yet been put in place. Second, the increasing amount of aid actors involved in tourism, and in particular the wide diversity of profiles (multilateral, bilateral, etc.), affects the willingness to establish a coordination group. The interviews reflected clearly that in the last years, actors have individually started getting involved in tourism without a clear communication among them, primarily because they are not used to working together. Lastly, coordination is complicated by the fact that every aid actor has its own interlocutor within the Uzbek Government based on its profile, scope of action and its experience on the ground. This is particularly true for tourism, as, given its cross-cutting nature, aid actors involved in tourism deal separately with various organs, such as the State Committee of the Republic of Uzbekistan for Investments, the State Committee for Tourism Development, the Ministry of Culture, or the Ministry of Agriculture and Water Resources (See Annex 6).

7. A stronger coordination would improve the efficiency of aid through tourism and foster its positive impact on Uzbekistan's development

A weak coordination has a negative impact on the efficiency of the assistance as it prevents a good channeling of funds between donors and implementing agencies. It also undermines the establishment of strategic partnerships among aid actors who sometimes need to join their forces to provide a more complete answer to a problem. Lastly, there is no platform for facilitating the exchange of best practices and evaluation outcomes in tourism projects, which may lead to the duplication of projects and affect the overall effectiveness and sustainability of projects.

The analysis conducted allowed us to conclude that tourism aid in Uzbekistan is an area with increasing interest, offering important opportunities in the future. Yet, the

significant lack of coordination and communication, both among aid actors and within the Government, makes it difficult to assess the real dimension of tourism-related projects in development and to promote in a strategic, needs-based manner the development of new projects.

Analysis of the profile of UNWTO

Considering the above, the strengths and weaknesses of UNWTO in the context of Uzbekistan were identified before drafting a set of potential recommendation for enhancing its future involvement.

Strengths and opportunities

Compared to other agencies involved in tourism, the main competitive advantage of UNWTO remains, undoubtedly, its specific expertise in tourism. While lots of aid actors are engaging in tourism, they usually need to hire external tourism consultants for tourism-related projects given that they lack this specific expertise. This was indeed explained during the interviews both representatives of EBRD, UNESCO and JICA.

This represents a strong opportunity for UNWTO, in particular considering that it is the only United Nations agency focusing on tourism. UNWTO cannot compete with the strong capacities of other aid actors (both in terms of funding & human resources); yet, the agency can position itself as a reference in tourism knowledge and expertise, and provide its services to other partners. In addition, the fact that the coordination is low could represent an opportunity as none of the actors are aware of the work done by others in this regard. Rising interest in aid for tourism in the country, along with need for specific tourism expertise, offer important opportunities for UNWTO's involvement in Uzbekistan in the future.

Weaknesses and potential threats

Surprisingly, the principal weakness of UNWTO is not, as initially thought, its limited resources. Its main disadvantage is the fact that it is relatively unknown in the Uzbek aid sphere, both by donors and other implementing agencies. Indeed, many of the representatives were not aware of UNWTO's work, including the UN coordinator and

JICA. Potential reasons include the fact that UNWTO does not have any presence on the ground, which was confirmed by the representative of UNESCO as a weakness, the relatively low contact maintained with other aid actors and the low coordination existing in Uzbekistan. Another important weakness is the relatively low contact with the Uzbek Government and the fact that UNWTO only engages with the State Committee for Tourism, while other agencies, such as multilateral banks, engage with several Committees. Table 8 provides a more detailed overview of identified strengths and weaknesses.

Table 8: SWOT analysis of UNWTO in the context of Uzbekistan

Strengths	Weaknesses
<ul style="list-style-type: none"> • Specialized technical expertise in tourism • UN specialized agency and the visibility this provides (Trusted international organization, whose recommendations have weight and are more likely to be implemented) 	<ul style="list-style-type: none"> • No regular budget for development projects • No local presence • Relatively unknown, including within the UN system • Only point of contact within the Uzbek Government: State Committee for Tourism • Weak relation with donors • No evaluation of projects nor promotion of development work
Opportunities	Threats
<ul style="list-style-type: none"> • Tourism is a priority for the Uzbek Government • Strong interest in tourism as aid from important donors • Need for technical expertise raised by other donors and agencies • Lack of coordination • Opening of the Silk Road Office • Inclusion of tourism in Donors action plans (EU and Korea) • Organization of the 65th UNWTO Regional Commission for Europe in Uzbekistan in 2020 	<ul style="list-style-type: none"> • Local presence of all aid actors involved in tourism • Emergence of new aid actors in tourism, including from within the UN family • Relatively low contact with the Uzbek Government

Recommendations for the work of UNWTO

Given the above, we intended to draw a series of potential recommendations for the involvement of UNWTO in Uzbekistan. These include:

- 1. Raise awareness of the expertise and capacity of UNWTO.** Emphasis should be put on promoting the work of UNWTO in development and the potential services it can offer to key actors: the Government, donors, other implementing actors, and the private sector. In particular, the work done in tourism along the Silk Road, through the Silk Road programme, represents a strong asset which should be promoted considering its relevance for Uzbekistan. Evaluation reports, as the ones prepared by UNDP, or publishing information on the project online, could help give visibility to the work done in this regard.
- 2. Build stronger ties with other aid actors, both with donors and potential partners.** UNWTO should look into engaging with donors and also, importantly, joining forces with other aid actors in Uzbekistan. Other aid actors, such as ADB, World Bank or JICA have a more established local network which could benefit UNWTO and facilitate its involvement in the country. While a contact has already been established with EBRD and UNESCO in the past, the EU and KOICA could be interesting new partners considering both their funding capacities and specific reference to tourism in their new strategies. Emphasis should also be put on building stronger ties with the United Nations Office to ensure UNWTO is taken into consideration in future tourism – related projects. In addition, the interview with the UNESCO representative helped us understand the importance of the relationship at a Headquarters level, which influences the partners of a project. It is therefore important for UNWTO to work on developing and strengthening its partnerships with relevant partners.
- 3. Strengthen existing relation with the Government.** The role that the Government plays in identifying the needs and potential partners is crucial, as highlighted by all the representatives interviewed. A stronger relation with the Government, *both* with the State Committee for Tourism and the State Committee for Investment, is therefore needed to ensure UNWTO is considered

in future projects. As highlighted by the representative of the UN Coordinator Office, the Government plays a key role in defining who the partners of a project will be. The Government has also a better overview of tourism development projects currently taking place. It is therefore important for UNWTO to nurture the current relationship with the State Committee for Tourism, and consider getting closer to the State Committee for Investments.

- 4. Foster contact with the private sector.** The private sector is of utmost importance for the development of the country. In addition, as explained by the representative of EBRD, the private sector is the main client of development banks and has some influence in defining who the main partners will be. Given that UNWTO has the capacity to provide technical assistance to the private sector, a stronger link with private stakeholders could facilitate the future recommendation and involvement of UNWTO in projects.
- 5. Position UNWTO closer to the field.** All implemented aid actors are present on the ground through a local office which certainly facilitate the promotion of their work and the frequent contacts with other aid actors. Most of them have indeed been present for over twenty years, which helped them to establish a network and facilitate the establishment of partnerships. UNWTO has a minor local representation through the Silk Road Office within the Government and should certainly take advantage of this opportunity to get more involved in development work.
- 6. Consider establishing a coordination group on tourism, with the UN coordinator office.** Considering the need for such an initiative, UNWTO could, in collaboration with the local UN office, take the lead in organizing a Working Group on tourism to bring together donors and agencies involved in tourism – an excellent opportunity to promote its capacities, solve the issue of cooperation, promote the exchange of best practices and take the lead as the UN agency responsible for tourism.

7. **Identify concrete upcoming opportunities to be considered in the elaboration of an action plan.** Based on the above analysis, these future initiatives offer a good momentum to work on enhancing the engagement of UNWTO in Uzbekistan.
- a. **Annual International Investment Forum in Tourism**, held annually in Tashkent.
 - b. **Annual Korea - Central Asia Cooperation Forum**, organized by the Republic of Korea and attended by representatives from international organizations, could provide a good opportunity to strengthen ties with KOICA.
 - c. **2020 will be UNWTO Year for Rural Development.** Considering that most of the EU budget in aid in Uzbekistan is directed to rural development, interesting collaboration opportunities may arise with the EU.
 - d. **65th UNWTO Regional Commission for Europe in Uzbekistan in 2020**, a good platform to organize a Working Aid group on tourism or meet aid actors.
 - e. **Use upcoming Silk Road initiatives** to promote the work of UNWTO in this regard.

Conclusions

The recent economic reforms put in place by the Government of Uzbekistan, along with the recognition of tourism as a priority sector and the important cultural heritage of the country, offer significant opportunities for the development of tourism in the country. The many challenges that still need to be addressed to foster the development of the sector, along with the increasing recognition of tourism as a tool for development, explain the recent involvement of major aid actors in tourism-related projects in Uzbekistan, which is expected to significantly increase in the upcoming years as demonstrated by our research.

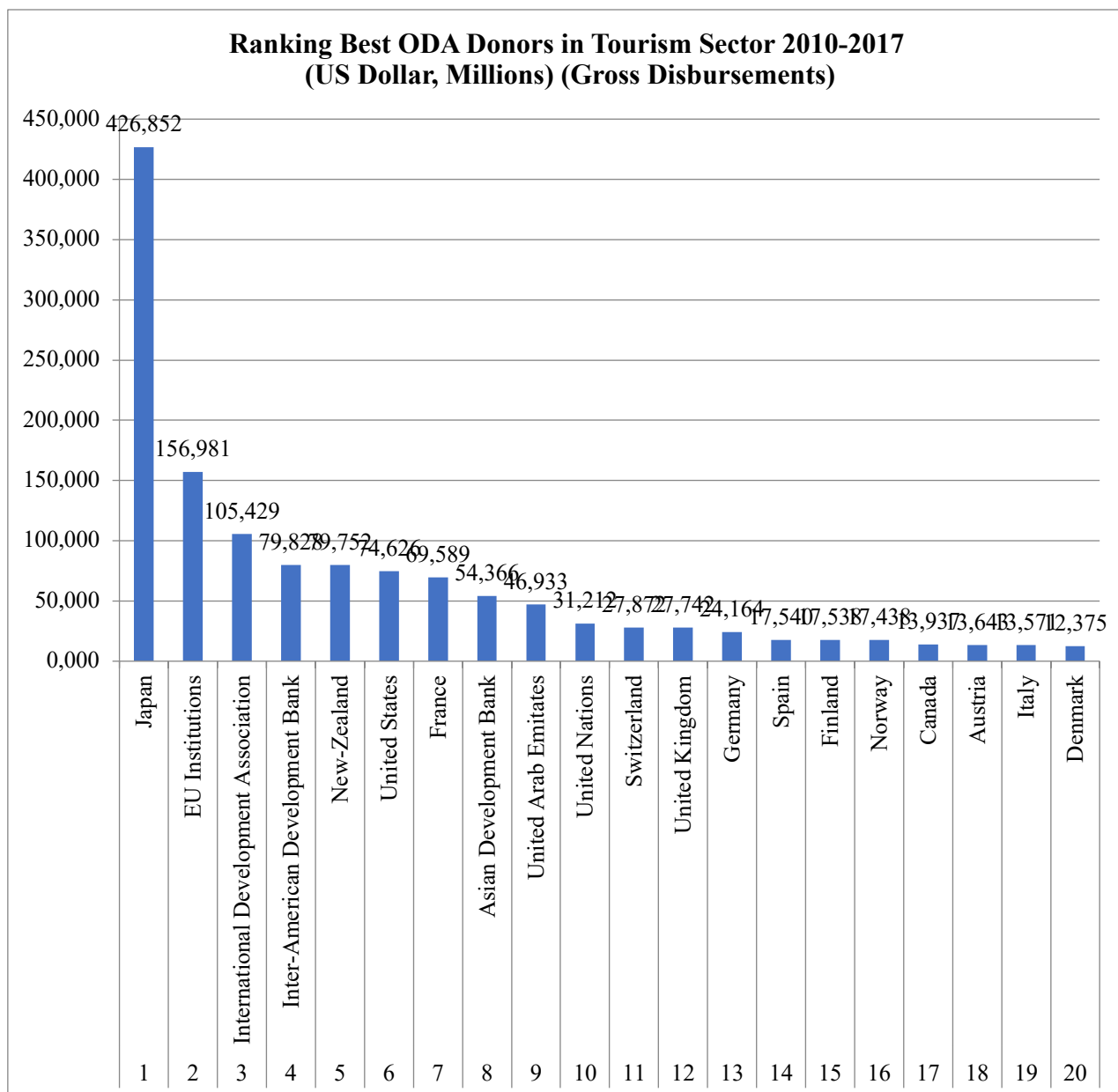
Yet, findings show that the sector of aid in tourism in Uzbekistan is characterized by a multiplicity of actors, the emergence of new ones, and a certain lack of coordination between actors, which affects the efficiency of aid. Most of the aid actors have a well-established presence on the ground, and important resources, both on a financial and human resources level which allow them to get involved in a wide variety of sectors, not limited to tourism.

Against this backdrop, the research allowed us to define that UNWTO has significant opportunities to get involved in tourism-related projects, besides an apparent lack of resources and a very limited presence on the ground. Indeed, its main competitive advantage remains its very specific expertise in tourism, often lacked by other institutions, its belonging to the United Nations system and the reputation and neutrality associated to it. As UNWTO is not well-established in Uzbekistan, and often not widely known by other development actors, the key to get involved in tourism-related projects in the country lies in partnering with more-established, stronger partners. UNWTO will therefore need to put emphasis on strengthening its ties with other aid actors, both on the ground and at a headquarters level, and, most importantly, work on giving visibility to its expertise and capabilities on a global level.

Given the development prospects of the tourism sector in Uzbekistan, recommendations include working towards the implementation of an action plan to be implemented in a short lapse of time, as an increasing amount of aid actors are foreseen to get involved in tourism in the very near future.

Annexes

Annex 1: Ranking best ODA Donors in Tourism Sector, 2010-2017



Source: ((OECD), ODA data, 2019)

Annex 2: Map of Uzbekistan



Source: Lonely planet

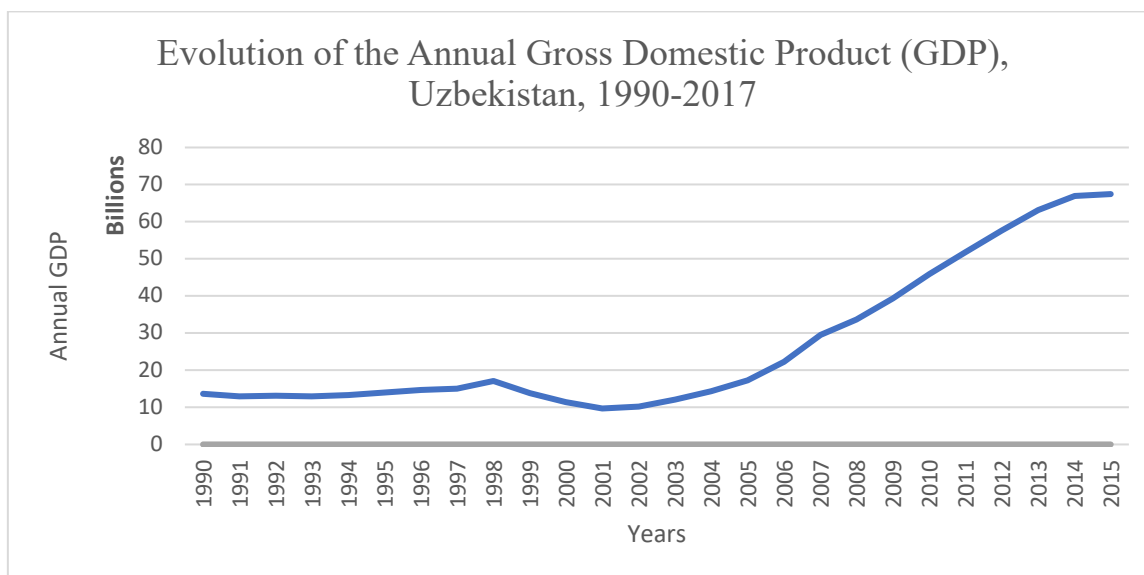
Annex 3: History of Uzbekistan

Under authoritarian President Islam Karimov, who ruled from 1989 until his death in 2016, Uzbekistan was reliant on exports of cotton, gas and gold to maintain its rigid, state-controlled economy. After his death, he is replaced by Successor Shavkat Mirziyoyev who will focus on easing relations with neighbors, and put great emphasis in introducing wide-ranging economic, judicial, and social reforms.

Annex 4: Damages of ecosystems in Uzbekistan

Decades of intensive agricultural policies under the Soviet era in pursuit of greater cotton production have resulted in severe damages of the fragile ecosystems, including the sadly famous desiccation of the Aral Sea in Karakalpakstan (MICKIN, 1988). As a result, the country suffers from a pressing access to drinking water as reflected by the fact that less than half the population has access to good quality drinking water, and fewer than 1 in 5 urban households receive water 24 hours per day ((WB), 2017).

Annex 5: Evolution of GDP, Uzbekistan, 1990 – 2017



Source: ((WB) T. W., *The World Bank in Uzbekistan, 2019*)

Annex 6: Detailed information on the main development actors in tourism

The European Bank for Development and Reconstruction (EBRD)

The first projects implemented by EBRD in Uzbekistan date back to 1996, but the bank has significantly increased its involvement in the country in the last two years. Since the beginning, the bank has invested over 1.569 billion of euros in the country. Out of the 40 projects implemented in the country since 1996, half of them took place in the last two years, and the bank expects this trend to continue given the economic development the country is currently undergoing. The economic reforms put in place in 2016 by the Government have greatly facilitated the involvement of EBRD, which gradually expanded its degree of involvement from initially focusing on the private sector, before working on the transition to the green economy (energy, infrastructures etc), the improvement of connectivity (transport) and more recently, tourism.

While the bank initially focused entirely on the transition to the green economy or the improvement of transportation, the institution is increasingly involved in tourism-related projects. Tourism was identified by the representative of EBRD as “a major sector, and an indisputable key area for the years to come in Uzbekistan”. The

involvement of EBRD in tourism was initially requested by the private sector – the bank’s main partner-, and later supported by the local authorities and the Government.

The Asia Development Bank (ADB)

The Asia Development Bank (ADB) started working in Uzbekistan in 1997, coinciding with the opening of the ADB Tashkent office. Since then, the bank has invested over 4.1 billion USD (Ref), one fourth of it taking place only in 2018. Just as other multilateral banks, most of the support provided today takes place through loans (1.38 billion USD), and a more modest part through technical assistance (8 millions USD).

Just as EBRD, ADB started recently getting involved in tourism. The proposal project untitled “Sustainable Tourism Development in the Central Asia Regional Economic Cooperation Region” serves as a good reflection of it. A 2 million USD dollars project, the project aims at increasing the cooperation between Central Asia countries through the development of a regional tourism strategy for 2030 and the enhancement of institutional capacity ((ADB), 2019). The increasing interest demonstrated by the bank is also reflected in the inclusion of tourism as a priority sector in the 2030 strategy of ADB for the Central Asia Regional Economic Cooperation (CAREC) ((ADB) A. D., 2019).

The World Bank (WB)

Since Uzbekistan joined the World Bank in 1992, the institution has carried out around 60 projects in the country. Since its re-engagement in 2008, the WBG’s program in Uzbekistan has gradually increased in terms both of amount of financing and areas of engagement. The World Bank is today supporting Uzbekistan through the implementation of 19 projects, totaling over 3.32 billion USD ((WB), 2019).

Reference to specific tourism-related projects started after 2016, with the organization of the Sustainable Tourism Development along the Silk Road Workshop, in Khiva, Uzbekistan, in October 2017, and the implementation of at least two projects specifically referring to tourism activities. The World Bank is particularly known for

being the traditional partner of the Government and for having excellent coordination with other development partners ((WB) W. B., 2019).

The United Nations

The United Nations office opened in Tashkent in 1993, a year after Uzbekistan joined the United Nations system. As of today, eleven United Nations agencies are present on the ground⁹. Given their combined wide scope of expertise, the agencies work on several topics such as education, health, governance, poverty reduction and biodiversity. Several partnership agreements have been signed with UN agencies – none with the UNWTO so far (EU, 2018).

The United Nations Development Assistance Framework (UNDAF) for the Republic of Uzbekistan 2016-2020 makes reference to tourism under one sole category - “Thematic Area 1: Inclusive economic development, with a focus on employment and social protection, Promotion of productive employment and income generation opportunities”. ((UN), 2019) As mentioned by the representative from the UN Coordination Office, the principal agencies involved in tourism are UNESCO and UNDP. The UN Coordinator Office is responsible for coordinating the work of the United Nations Agencies in Uzbekistan and has had very few exchanges with UNWTO up to date. Although the involvement in tourism was relatively low in the last years, it is greatly expected to increase in the next years, given the “*increasing recognition of tourism as a tool for development*”.

As mentioned by the representative from the UN Coordination Office, the principal agencies involved in tourism are UNESCO and UNDP. UNESCO started getting involved on tourism in the 90s, although its involvement in tourism projects significantly increased in the last years. As explained by the representative of UNESCO, its scope of action includes capacity building activities (Training of tourism guides), branding and activities related to the World Heritage Sites. Given the large

⁹ United Nations Development Programme (UNDP), United Nations Population Fund (UNFPA), United Nations Children’s Fund (UNICEF), World Health Organization (WHO), United Nations Educational, Scientific and Cultural Organization (UNESCO), United Nations Office for Drugs and Crime (UNODC), United Nations Regional Centre for Preventive Diplomacy in Central Asia (UNRCCA), International Labour Organization (ILO), Food and Agriculture Organization (FAO), UN Migration Agency (IOM) and UN Volunteers (UNV) administered by UNDP ((UN), 2019)

amount of cultural sites that still need to be enhanced, the representative did highlight the necessity to expand their efforts in tourism. As far as partners are concerned, its main local partners are the Ministry of Culture and the State Committee for Tourism. Relationship with UNWTO is today not very strong, although close contact used to be held at a Headquarters level a couple of years in regards to specific tourism projects.

The European Union (EU)

The European Union is today the leading donor in Central Asia and the single largest financial contributor to the UN system ((EU), 2019). The EU has recently engaged in signing individual Enhanced Partnership and Cooperation Agreement with countries in order to extend its development assistance in the region. Interestingly, tourism was mentioned as a key area of cooperation in the Kazakhstan agreement (Union, 2016), which reaffirms the willingness of the EU to engage in the sector. Considering that Uzbekistan and the EU are now in the process of drafting a similar document for Uzbekistan, along with the similarities existing between Central Asia countries, it is highly probable that tourism will also be included in the Uzbek document.

While the projects focused essentially on supporting the process of transition from the Soviet era, the aim of the EU assistance program to Central Asia can be today narrowed down to three priorities: Central Asian regional cooperation and good neighborly relations; reduction of poverty and increase of the standards of living; and promotion of good governance and economic reform (Bajrektarevic & Brletich, 2016). The EU provides financing essentially through technical expertise, capacity building, studies, investment promotion activities and grants in support to Civil Society. During the period of 2014-2020, a total grant of EUR 168 million is planned for Uzbekistan bilateral assistance programmes under the EU Development Cooperation Instrument (DCI), equivalent to an average annual budget of EUR 24 million per year.

The Japan International Cooperation Agency (JICA)

JICA's cooperation with Uzbekistan started in 1993 and the office opened in 1999. Since then, JICA has been supporting Uzbekistan through loans, grants and technical

assistance activities in a wide scope of sectors including rail transport, oil and gas, energy, mining, automobile industry, tele- communications, electronics, textile industry and tourism. The strong relationship existing between the two countries is rooted in the “Central Asia + Japan” policy schemes (institute, 2016), and reinforced by a number of parallel initiatives such as the organization of the Uzbek-Japanese business forum aimed at fostering the attraction of Japanese foreign investments. Tourism was mentioned as an increasing segment of interest for JICA by the representative of JICA, considering the importance it represents for the Government. Reference to tourism-related projects date back to 2017, with projects focusing on tourism development policies and management of the World Heritage Sites ((JICA), 2018).

The Korea International Cooperation Agency (KOICA)

Korea and Uzbekistan share a long-standing economic, cultural and diplomatic relationship, rooted in the historical connections existing between the countries and the existence of a large Korean diaspora living in Uzbekistan since the beginning of the 20th century, as the last census registered 99,700 individuals in 1999 (Wikipedia, Koryo-saram, 2019) . Since its implementation in Uzbekistan in 1995, KOICA has supported the country with over 94.32 million USD, directed to the implementation of 29 projects in healthcare, education, information technology, public utilities, agriculture and water management, energy, transport and education, the latter being the most active sector of KOICA in Uzbekistan – its so-called “Soft power” (Varpahovskis, 2017). The strong relationship existing between the two countries is also reflected in trade, as the country is home to 461 joint Uzbek- Korean companies and the volume of investment of South Korea into Uzbekistan exceeded 7 billion US dollars.

An increasing interest is given to tourism within development which is most certainly related to the importance of the Korean market in Uzbekistan, as it represents the fourth largest source market ((UNWTO), Uzbekistan Tourism Insights – Findings from the Uzbekistan International Visitor Economy Survey 2014 and National Tourism Satellite Accounts, 2015). Important efforts were put forward by both countries in recent years to enhance tourism flows between the countries, through the facilitation of visa procedures and investments at the Navoi airport. The signing of the “Joint declaration on a special strategic partnership”, in April 2019, covering the implementation of 29 projects worth

12 billion of USD of trade, economic, investment, financial and technical cooperation deals, makes a specific reference to tourism infrastructures.

Annex 7: Matrix of principal aid actors involved in tourism in Uzbekistan

	Development banks			National development agencies		International organizations	
	European Bank for Reconstruction and Development (EBRD)	Asia-Development Bank (ADB)	World Bank Group	Korean International Cooperation Agency (KOICA)	Japanese International Cooperation Agency (JICA)	United Nations Educational, Scientific and Cultural Organization (UNESCO)	European Union (EU)
Name	Regional development bank	Regional development bank	Development group	Government agency	Government agency	United Nations Agency	European Union (EU)
Type of institution	Regional development bank	Regional development bank	Development group	Government agency	Government agency	United Nations Agency	European Union (EU)
Mandate	Support the transition towards a well-functioning sustainable market economy and the promotion of private and entrepreneurial initiative in Central and Eastern European countries.	Promote economic growth and cooperation in Asia and the Far East and contribute to the acceleration of the process of economic development of the developing member countries in the region, collectively and individually.	Reduce poverty and build shared prosperity in developing countries	Combat poverty and support the sustainable socioeconomic growth of partner countries	Contribute to the sound development of Japanese and global economy by supporting the socioeconomic development, recovery or economic stability of developing regions.	Forge a culture of peace by fostering the generation and exchange of knowledge, including scientific knowledge, through international cooperation, capacity building and technical assistance to its Members	Ensures cooperation with partner countries at different stages of development to cover the specific needs of these countries, including during the transition periods between low income countries and upper middle income countries.
Main areas of work in Uzbekistan	Private sector, green economy, connectivity	Transport, energy, water and urban infrastructures services, agriculture and rural development, health, education, public sector management	Agriculture, water resources management, energy, transport, healthcare, education, urban development, water supply and sanitation services	Healthcare, education, information technology, public utilities, agriculture and water management, energy, transport and education	Economic Infrastructure, Privatization of Private Sector, Agricultural Reform and Rural Development	Education, Culture, Natural Sciences, Social and Human Sciences	Regional Sustainable Development Regional Security for Development and strong focus on rural development
Instruments	Financial instruments (loans, grants and lines of credit) and technical assistance	Financial instruments (loans, grants and lines of credit) and technical assistance	Financial instruments (loans, grants and lines of credit) and technical assistance	Grant and technical assistance	Grant aid, technical cooperation, loans	Technical assistance (Capacity building etc)	Donor / Technical assistance (Capacity building etc)
Office(s) in Uzbekistan	Tashkent	Tashkent	Tashkent	Tashkent	Tashkent	Tashkent	Tashkent
Year started working in Uzbekistan	1996	1997	1992	1995	1993	1996	1993
Year of office opening	2016	1997		1995	1999	1996	2011
Resources							
Employees on the ground	22 pple.	NA	NA	NA	NA	20 pple.	NA
Projects since beginning	40 (Half of them in last two years)	65 loans (25% of them in last two years)	60 (30% of them in last year)	NA	NA	NA	NA
Investments since beginning	NA	7.4 billions (USD)	NA	94.32 million (USD)	NA	NA	NA
Current investments in the country	1.72 billions (USD)	4.1 billions (USD)	3.32 billions (USD)	32.4 million (USD)	95 millions (USD)	NA	NA
Tourism							
Year started working on tourism-related	2017	2018	2016	2017	NA	90s	2018
Areas of work and instruments	1) Infrastructures (Roads, energy supplies, accommodations) 2) Support to the private sector (Loans, access to funding) 3) Capacity building	1) Infrastructures (Roads, energy supplies, accommodations) 2) Support to the private sector (Loans, access to funding) 3) Capacity building	1) Private sector growth (Financial instruments, capacity building) 2) Agricultural competitiveness and cotton sector modernization 3) Public service delivery (Transportations, health, education, water supply)	1) Grants 2) Technical assistance	1) Loans 2) Grants 3) Technical assistance	1) Capacity building (Tourist guides training) 2) Support on branding 3) Sustainable tourism development 4) Designation and management of World Heritage Sites	1) Cultural heritage
Strategic partnership paper		Country Operations Business Plan (2019-2021)	Country Partnership Framework for 2016-2020 for Uzbekistan	Memorandum of Understanding between KOICA and the State Investment Committee for 2018-2019	"Central Asia + Japan" policy scheme	United Nations Development Assistance Framework (UNDAF) for 2016-2020	2014 – 2020 Multi-annual Indicative Programme
Main partner on the ground	Private sector & Government (State Committee for Investment)	Private sector & Government (State Committee for Investment)	Private sector & Government (State Committee for Investment)	Ministry of Investment and Foreign Trade (MIFT) / Tourism Committee	Ministry of Investment and Foreign Trade (MIFT)	Government (State Committee for Tourism & Ministry of Culture and Sports)	Government (State Committee for Tourism & Ministry of Culture and Sports)
Partnerships with other development agencies (in tourism or other sectors)	ADB, UNWTO, UNESCO	EBRD, Islamic Development Bank, Agence Française de développement, World Bank, JICA,	ADB, EU, Islamic Development Bank, EBRD, Governments of Switzerland, Korea, Japan, United States, United Kingdom and Hungary		World Bank, ADB,	EBRD, UNWTO, JICA, KOICA, EU	EBRD,
Number of tourism projects currently s	2	1	0	2	1	1	1

Annex 8: Identified strengths of other aid actors involved in tourism and present in Uzbekistan

Development banks			National development agencies		International organizations	
EBRD	ADB	WB	KOICA	JICA	UNESCO	EU
Expertise and strong reputation within the development world in Europe (Since 1991)	Local network & long-established presence	Local network & long-established presence	Local network & long-established presence	Local network & long-established presence	Local network & long-established presence	Very important financial and human resources
Cross-cutting aid (Touches all sectors of the economy)	Cross-cutting aid (Touches all sectors of the economy)	Cross-cutting aid (Touches all sectors of the economy)	Contact with the Government and commercial links	Contact with the Government and commercial links	Relevance (Cultural sites and importance of cultural tourism in the country)	Reputation as one of the main donors & aid actors in Central Asia
Wide variety of instruments	Wide variety of instruments	Wide variety of instruments	Strong financial and human resources	Strong financial and human resources	Prestige and neutrality of UN agency	
Close link with both the private sector which is crucial for the development of the SDGs.	Close link with both the private sector which is crucial for the development of the SDGs.	Close link with both the private sector which is crucial for the development of the SDGs.				
Strong financial and human resources	Strong financial and human resources					

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